

Luke Farrell, CPA

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PROFESSIONAL EXPERIENCE

The Hackett Group, Denver, CO | *Senior Manager*

July 2025 to Present

- Lead \$500K–\$1.5M OneStream finance transformation programs end-to-end (design, architecture, build, testing, deployment) with budget and margin accountability and direct CFO/CIO advisory.
- Delivered OneStream implementation for a holdings organization exceeding \$1T AUM with sophisticated ownership requirements; rolled out planning across 20 planners feeding 15 forecast and budget plans with integrated security and governance.
- Built actual-to-forecast seeding and scenario capability, reducing forecast cycle time by one day and enabling self-service what-if analysis for finance stakeholders.
- Manage and mentor a blended onshore and nearshore consulting team; enforce build standards, QA gates, and documentation for sustainable operations.
- Architect OneStream applications (consolidation, planning, dashboards, business rules, data integrations) and drive adoption through design workshops, walkthroughs, UAT, and finance-focused training.

Roush Enterprises, Livonia, MI | *Financial Systems Administrator*

May 2022 to July 2025

- Owned OneStream and PeopleSoft administration as the SME bridging Finance and IT; partnered with CFO/CIO leadership and reduced unplanned escalations by approximately 8 hours per month through proactive monitoring and process redesign.
- Automated month-end PeopleSoft trial balance loads via SFTP pipeline, collapsing 8 manual loads (8 hours) into a 10-minute review with materially reduced rework.
- Architected a direct PeopleSoft to OneStream connection using Microsoft Power Automate, automating month-end GL transfer and eliminating a recurring failure point.
- Led design and implementation of OneStream's People Planning Solution with custom dashboards and automated data processing; retooled PP&E planning for accuracy and decision speed.
- Designed SOX-aligned operating standards, change control processes, and financial controls across OneStream and PeopleSoft environments; authored SOPs that institutionalized process knowledge.

Spaulding Ridge, Denver, CO | *Senior Associate*

July 2021 to April 2022

- Implemented OneStream for a multi-billion-dollar manufacturer supporting 1,000+ entities; integrated consolidation and FP&A processes and incorporated automation to improve reporting reliability.
- Analyzed customer requirements to design, configure, and test deliverable solutions; presented demo models to prospective clients across industries.
- Managed a team of 3 analysts and led live training and change management to drive client adoption.

Dish Network, Englewood, CO | *Business Analyst II*

April 2019 to July 2021

- Owned \$500M+ revenue FP&A across 40–50 departments, delivering weekly CFO reporting, monthly C-suite operating updates, and KPI scorecards presented directly to the CFO.
- Built 3-statement forecasts including EBITDA views; delivered full-year actuals within 1% of budget.
- Developed 10-year long-range planning models (3 years monthly, outer years annual) and 70 weekly non-financial KPIs
- Authored pricing model and recommendation adopted by leadership for profitability and churn decisioning; supported board and earnings package preparation.
- Led the CFO organization through the Hyperion to OneStream transition.

Dish Network, Englewood, CO | *Business Analyst I*

April 2018 to April 2019

- Managed Oracle Hyperion Planning enterprise-wide; partnered with business units to design KPIs and produce actionable reporting for organizational decision making.
- Developed an Excel Add-in for automated, timestamped PDF report generation, drastically reducing month-end reporting effort.
- Programmed a revenue forecast financial model into Hyperion Planning to simplify modifications; led trainings on advanced Excel and Oracle topics.

Dish Network, Englewood, CO | *Staff Accountant*

June 2016 to April 2018

- Built an automated process to maintain \$20M in prepaid expenses and record monthly amortization through the Oracle general ledger (saved ~4 hours per close cycle).
- Prepared journal entries and accruals to close financial periods; developed methodology to ensure reliability and consistency of reported financial data.

Geltrude & Co., LLC, Nutley, NJ | *Staff Accountant*

June 2015 to April 2016

- Audited client financial schedules (balance sheet, income statement, cash, AR/AP, accruals, repairs/maintenance, fixed assets) and prepared individual, corporate, partnership, not-for-profit, and trust tax returns.

EDUCATION, CERTIFICATIONS & TECHNICAL SKILLS

Education: Montclair State University, Montclair, NJ. Bachelor of Science, Accounting (Cum Laude).

Certifications: **Certified Public Accountant (CPA, Active)** • **OneStream Certified Professional – Lead Architect R1** • **OneStream Certified Professional – Core Platform Architect** • **OneStream Certified Associate in Administration R1** • **OneStream Certified Specialist – Reports and Dashboards**

Functional: 3-Statement Forecasting • Long-Range Planning • Consolidation & Close • Variance Analysis • KPI Design & Scorecards • Pricing & Churn Analytics • Board / Earnings Reporting • SOX Change Control • Process Automation

Platforms: OneStream • Oracle Hyperion Planning • Oracle PeopleSoft • Microsoft Power Automate

Languages: VB.Net • VBA • Python • SQL • MDX • Hyperion Calculation

Tools: Advanced Excel • Dashboards & Reporting • Data Integration

Recognition: The Hackett Group: Rising Star Award • Roush Enterprises: Employee of the Month • Dish Network: Customer Service and Process Innovator Awards